

WHAT YOU NEED TO BRING

- Proof of identity/military identification
- A copy of last year's Federal and State tax returns if available
- **SOCIAL SECURITY CARDS** for you, your spouse and any dependents included on the return. A Social Security Number verification letter issued by the Social Security Administration is acceptable.
- Birth dates for you, your spouse and dependents included on the return
- Wage and earning statements (Form W-2)
- Interest and dividend statements from banks, mutual fund companies and brokerages (Form 1099)
- Retirement income/distributions (Form 1099-R)
- Miscellaneous income statements Forms 1099-misc, W2G, etc)
- Student loan payment information
- IRA contribution information
- Documentation for deductions including unreimbursed medical expenses, state income and property taxes, mortgage interest, charitable contributions and unreimbursed business expenses
- Daycare expenses and providers Tax Identification Number or Social Security Number
- Bank routing number and account number for direct deposit
- Both spouses must be present to sign the required forms or an IRS Power of Attorney, General Power of Attorney that includes Income Taxes or a Special Power of Attorney for Taxes must be presented.

Fort Campbell Tax Center: (270) 798-1040